



Filing ID #10021118

# FINANCIAL DISCLOSURE REPORT

---

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

---

## FILER INFORMATION

**Name:** Ann Kirkpatrick  
**Status:** Congressional Candidate  
**State/District:** AZ02

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2018  
**Filing Date:** 04/29/2018  
**Period Covered:** 01/01/2017– 03/31/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Arizona State Credit Union Accounts [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Curley & Allison LLP Partnership Interest [OL] LOCATION: Phoenix/Maricopa, AZ, US DESCRIPTION: Interest in Law Partnership	SP	\$15,001 - \$50,000	None		
Edward Jones IRA ⇒ Cash [IH]		\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Edward Jones IRA ⇒ SPDR S&P 500 ETF TR UNIT SERIES I S&P DEPOSITORY [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Edward Jones ROTH IRA ⇒ Cash [IH]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Edward Jones ROTH IRA ⇒ ISHares S&P 500 Index Fund [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Fidelity IRA ⇒ Cash [IH]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity IRA ⇒ Fidelity NASDAQ Composite Index [MF]	SP	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Fidelity IRA ⇒ Spartan Total Market Index Fund Adv Class [MF]	SP	\$500,001 - \$1,000,000	Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000
Penn Mutual Whole Life Insurance [WU]	SP	\$1,001 - \$15,000	None		
Vanguard Investments ⇒ Vanguard Tax Exempt Money Market [MF]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Vanguard Investments ⇒ Vanguard 500 Index Fund Admiral Shares [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Vanguard Investments ⇒ Vanguard Total Stock Market Index Fund [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Wells Fargo Bank Accounts [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Wells Fargo IRA ⇒ Cash [IH]	SP	\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Wells Fargo SIMPLE IRA ⇒ Cash [IH]	JT	\$250,001 - \$500,000	Interest	\$1 - \$200	\$1 - \$200
Wells Fargo SIMPLE IRA ⇒ Wells Fargo Advantage Emerging Growth Fund [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Curley & Allison LLP	Spouse salary	\$210,000.00	\$224,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo Bank	May 2012	Mortgage on Flagstaff residence	\$100,001 - \$250,000
JT	Wells Fargo Bank Visa Credit Card	Various	Credit card charges	\$15,001 - \$50,000
JT	Bank of America	January 2017	Credit card advance	\$15,001 - \$50,000
JT	Wells Fargo Bank	Dec 2017	Mortgage on Phoenix condo	\$250,001 - \$500,000

**SCHEDULE E: POSITIONS**

None disclosed.

**SCHEDULE F: AGREEMENTS**

None disclosed.

**SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE**

None disclosed.

**SCHEDULE A ASSET CLASS DETAILS**

<ul style="list-style-type: none"><li>◦ Edward Jones IRA</li><li>◦ Edward Jones ROTH IRA</li><li>◦ Fidelity IRA (Owner: SP)</li><li>◦ Vanguard Investments (100% Interest) (Owner: JT) LOCATION: US</li><li>◦ Wells Fargo IRA (Owner: SP)</li><li>◦ Wells Fargo SIMPLE IRA (Owner: JT)</li></ul>
--

**EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION**

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?  
☐ Yes ☒ No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?  
☐ Yes ☒ No

**CERTIFICATION AND SIGNATURE**

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the

best of my knowledge and belief.

**Digitally Signed:** Ann Kirkpatrick , 04/29/2018